



NHRS

New Hampshire Retirement System

Strategic Business Plan Annual Progress Report

July 1, 2005 – June 30, 2006



July 1, 2006

Dear Trustees,

We are pleased to present the Board of Trustees with an annual progress report of the New Hampshire Retirement System (NHRS, “the System”) Strategic Business Plan for the fiscal year ending June 30, 2006.

NHRS management and staff have remained focused on the Strategic Business Plan since its inception in the summer of 2005, working diligently to improve member, retiree and employer services, to develop and implement best practices, and to build a learning organization. Each manager has summarized his or her functional area’s Fiscal Year 2006 major accomplishments in this report and has provided a list of new and/or revised goals for the 2007 and 2008 fiscal years, and new goals for the 2009 fiscal year. As a work-in-progress, the Strategic Business Plan requires ongoing monitoring and review, as well as modified goals based on the needs of the NHRS membership, and revised priorities as the result of those needs.

The development of functional areas has facilitated more cohesive operations, leading to improved workflow and business processes, and generating greater efficiency and efficacy with strategic outcomes. Functional areas work collaboratively to develop, implement and measure strategic initiatives. Although one functional area may coordinate and manage a business goal, many teams participate in and support the various strategic initiatives.

While there have been numerous advancements made in support of the NHRS mission, a few major initiatives are particularly noteworthy:

To further strengthen internal controls and establish appropriate monitoring processes as part of its best practices, NHRS has developed and implemented an internal compliance functional team including a chief legal counsel, a hearings officer, an internal auditor and a compliance officer.

Consistent with implementing best practices, NHRS now reviews all of its professional service providers on a periodic basis. In the fall of 2005, NHRS issued a Request for Proposal (RFP) for investment consulting services, resulting in the selection of Ennis Knupp to serve as the System’s general investment consultant. The investment consultant conducted an asset liability modeling study to review and develop an asset allocation designed to enable the System to meet its long-term liabilities.

In April 2006, NHRS issued an RFP for actuarial consulting services with the selection process currently in progress.

Another major milestone for NHRS was the ratification of its first collective bargaining agreement in February 2006. This historic event represents the first agreement between

NHRS, as an organization that is independent of the state's classified system, and the State Employees Association (SEIU). Consistent with strategic plan initiatives, the CBA process was a collaborative accomplishment including both management and non-management members, as well as external parties.

The Strategic Business Plan serves as NHRS' roadmap for navigating the challenges of a growing retirement-eligible population, rising demand for pension plan information and services, and increasing trust fund assets and complexity. As this report depicts, NHRS is successfully delivering comprehensive services to its membership, prudently addressing pension plan administration and funding issues, and fostering a positive work environment rich with resolution-focused activities and professional conduct.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Robert S. Leggett". The signature is fluid and cursive, with the first name "Robert" and last name "Leggett" clearly distinguishable.

Robert S. Leggett
Executive Director

Business & Financial Reporting

Richard Joyal, Director

The Business & Financial Reporting functional area progressed in several areas specific to Employer Reporting Services; Business Administration, Budget and Procurement; Pension Fund Accounting and Reporting; and Fund and Actuarial Administration. Business & Financial Reporting also experienced several human resource changes during Fiscal Year 2006.

Fiscal Year 2006 Accomplishments:

Employer Reporting Services:

- Reduced by approximately 50% the number of pre-list employers (employers who transmits contribution data to NHRS in paper format rather than electronically)
- Continued the process of reconciling and balancing employer monthly balances, reducing the employer account balance backlog by approximately 80%
- Revised and updated the employer reporting manual to reflect the current employer reporting environment and submitted draft to Legal & Compliance for review

Business Administration, Budget and Procurement:

- Relocated the NHRS office from 4 Chenell Drive to 54 Regional Drive by March 2006
- Identified alternative uses for the 4 Chenell Drive building
- Participated in identifying financial software required to process accounts payable, payroll, budgeting, and human resources transactions

Pension Fund Accounting & Financial Reporting:

- Completed the FY 2005 financial audit and the preparation of the Comprehensive Annual Financial Report (CAFR) in collaboration with the Investments functional area
- Continued to reconcile the general ledger system to the Pension Gold system, making significant progress
- Determined and implemented alternatives for accounting of alternative investments, to improve the timing and reporting of alternative investments for both accounting and performance reporting purposes
- Accomplished the annual Federal withholding tax process including the issuance of 23,000 1099-R's to members and retirees

Fund & Actuarial Administration

- Initiated Request for Proposal (RFP) process for actuarial consulting services
- Conducted and reviewed the five-year experience study
- The Board adopted certain actuarial assumptions and option factors based on the findings of the experience study and the recommendation of the consulting actuary

Fiscal Year 2007 Goals:

Employer Reporting Services

- Resolve delinquent payment penalty issues in Pension Gold system
- Implement the ERS Employer User Guide
- Develop a comprehensive employer training plan
- Complete proposal for modifying Pension Gold system to handle non-line business transactions
- Continue to reduce the number of pre-list employers by 50%
- Increase accuracy of employer reporting to 90% by continuing employer reconciliation efforts

Business Administration Budget & Procurement

- Develop and implement a Business Continuity Plan
- Fully implement accounting and budgeting systems to establish autonomy from State accounting systems
- Develop a plan to monitor and report on the agency budget and train staff in budget preparation
- Develop and implement an annual facilities maintenance evaluation plan
- Adopt and implement purchasing guidelines as needed
- Continue to work with the Safety Committee on efforts to provide a safe environment for employees and members

Pension Fund Accounting & Financial Reporting

- Continue to reconcile the general ledger and Pension Gold
- Define the roles and responsibilities of the Member Accountants in the financial accounting process
- Review and implement alternative accounting solutions for alternative investments
- Prepare for implementation of GASB 43 & 45 post-employment benefit accounting provisions in fiscal year end June 30, 2007 annual report (CAFR) through education & training.
- Review and implement increased electronic dissemination of CAFR to reduce the number of printed hard copies needed

Fund & Actuarial Administration

- Evaluate responses to the actuarial services request for proposal (RFP) and identify appropriate candidates for review by the NHRS trustees
- Evaluate and recommend changes to the actuarial practices based on the Fiscal Year 2005 Actuarial Valuation and Experience Study to achieve stable contribution rate environment, and to maintain and enhance plan funding ratio, appropriate member interest rate, and solvency of the Post-Retirement Medical Plan
- Analyze the implications of HB 181 and develop alternatives for funding COLAs while maintaining the plan funding ratios
- Review, streamline and document work processes and procedures
- Develop workforce plan to include needs assessment, effective deployment of current resources, cross-training and succession planning
- Review and revise, as necessary, policies, guidelines and procedures

Fiscal Year 2008 Goals:

Employer Reporting Services

- Increase accuracy of employer reporting to 95% by continuing employer billing reconciliation efforts
- Implement comprehensive employer training program
- Review salary continuance process to determine ways to enhance the timeliness of employer salary continuance payments and overall internal control of the salary continuance process
- Update ERS Employer User Guide as needed

Business Administration Budget & Procurement

- Monitor and revise the Business Continuity Plan, as needed
- Develop and implement a comprehensive agency risk management program and assign appropriate responsibility for that program
- Refine newly implemented accounting and budgeting systems

Pension Fund Accounting & Financial Reporting

- Implement GASB 43 & 45 post-employment benefit accounting provisions in the fiscal year ending June 30, 2007 annual report (CAFR)
- Develop a strategy for increasing electronic reporting of information to the Board of Trustees
- Review annual report (CAFR) to determine if enhanced presentation capability can be accomplished while maintaining GFOA required standards
- Establish overall monthly accounting reconciliation plan that specifies exactly what accounting related items (both Pension Gold related and non-Pension Gold related) will be reconciled, how they will be reconciled, and assign responsibility for performing the monthly reconciliation

Fund & Actuarial Administration

- Conduct FY 2007 biennial valuation and evaluate plan funding status
- Conduct FY 2007 valuation for retiree health insurance subsidy
- Analyze the implications of HB 181 and develop alternatives for funding COLAs while maintaining the plan funding ratios

Fiscal Year 2009 Goals:

Employer Reporting Services

- Continue to provide regularly scheduled comprehensive employer training program
- Update ERS Employer User Guide as needed
- Review current cash receipt process to determine whether there are alternative electronic payment methods available to provide more efficient and timely receipt of member and employer contributions

Business Administration, Budget & Procurement

- Review and revise the risk management plan as needed
- Integrate the Business Administration, Budget and Procurement and Accounting functions into one department
- Monitor and revise the Business Continuity Plan

Pension Fund Accounting & Financial Reporting

- Implement monthly accounting reconciliation plan
- Issue Request for Proposal (RFP) for Banking Services
- Implement new GASB pronouncements as needed

Fund & Actuarial Administration

- Evaluate and recommend changes to the actuarial practices based on the Fiscal Year 2007 Actuarial Valuation and Experience Study to achieve stable contribution rate environment, and to maintain and enhance plan funding ratio, appropriate member interest rate, and solvency of the Post-Retirement Medical Plan
- Analyze the implications of HB 181 and develop alternatives for funding COLAs while maintaining the plan funding ratios

Human Resources (HR)

Jodi Kelley-Holmes, Director

The Human Resources functional area facilitated numerous initiatives throughout Fiscal Year 2006 including various committee-based activities, and developed and implemented several goals to support a learning organization, workforce planning and best practices.

Fiscal Year 2006 Accomplishments:

Learning Organization:

- Accomplished Phase I of a new Individualized Strategic Performance Plan (ISP) performance management initiative, which reflects strategies to achieve individual, departmental, and NHRS-wide performance goals, all linked to the NHRS strategic business plan
- Seven staff members received \$23,500 in direct tuition assistance for 34 college level courses (Four staff members successfully attained their college degrees/certifications within this past year: one MBA with a post-graduate professional certificate; one Bachelors; two Associates)
- Approximately 30 staff members participated in more than 20 external professional development opportunities
- The NHRS Labor Management Committee hosted two on-site educational sessions for staff, with an external presenter, on the Collective Bargaining Process in the Public Sector

Workforce Planning:

- Restructured the staff reporting structures based on strategic plan functional areas, and revised functional area structure to further streamline and consolidate two-related areas into one
- Established seven newly-developed and approved positions: five have been successfully filled, and two remain in various stages of the recruitment process
- Converted three temporary part-time positions to permanent
- Recruited for and filled 12 positions: five positions were filled with qualified internal candidates (promotions), and seven positions with external candidates
- Eliminated reliance on agency-based temporary workers (net reduction of five full-time employees of externally contracted staff)
- Accomplished Phase I of workforce plan designed to support NHRS strategic objectives, including needs assessment and resource development for the six-month period ending 6/30/06
- Began a more comprehensive plan encompassing human resource needs and organizational re-structuring over the course of the next three years

Best Practices:

- The first master Collective Bargaining Agreement between NHRS and the State Employees' Association (SEA) was agreed upon by the collective bargaining teams, approved by the respective parties, and signed into effect on February 14, 2006
- Developed NHRS-specific job valuation system, including training of identified NHRS staff on system and new methodology
- Established the NHRS Position Assessment Committee (PAC), for the purpose of conducting internal position assessment utilizing the Hay Methodology

- Instituted mandatory, regularly-scheduled functional team meetings (no less than bi-weekly) as a strategy to facilitate information sharing between staff in functional areas, and between management and staff
- Revised two significant personnel-related policies and procedures to establish practices independent of the state's classified system, and to better allow for the expansion of alternate and flexible employee work schedules

Fiscal Year 2007 Goals:

- Continue to develop and implement NHRS-specific HR and payroll policies, procedures, and forms. ("Forms" added to goal)
- Continue with implementation of appropriate components of approved Phase I workforce plan including hiring/training/realignment of resources (Goal is now specific to "Phase I")
- Coordinate efforts of the NHRS Collective Bargaining Team to successfully negotiate the Collective Bargaining Agreement for 7/1/07, negotiations to begin in plan year 2007
- Develop proposal for new NHRS compensation program
- Update and monitor individualized strategic performance plans for all staff (ISP's) and related performance evaluations which reflect strategies to achieve individual, departmental, and agency-wide performance goals (existing goal with updated terminology from PDP's to ISP's)
- Present Phase II of comprehensive workforce plan for plan years 2006 through 2009, and begin implementation of approved components relative to this plan year
- Conduct a comprehensive needs assessment of NHRS workforce training needs
- Begin implementation of an independent HR/Payroll software system

The following goals have been removed from Fiscal Year 2007:

- Implement new NHRS compensation structure in line with recommendations from HayGroup, Inc. and consistent with negotiated collective bargaining agreement. (Goal moved to Fiscal Year 2008)
- Develop a comprehensive, multi-tiered staff education and professional development program (Goal moved to Fiscal Year 2008)

Fiscal Year 2008 Goals

- Establish standardized knowledge and comprehension competencies for industry and NHRS-specific functions for staff positions
- Develop a comprehensive, multi-tiered staff education and professional development program. (Goal moved from Fiscal Year 2007)
- Implement any revised terms of the new Collective Bargaining Agreement, effective 7/1/07
- Implement new NHRS compensation structure in line with recommendations from HayGroup, Inc. and consistent with negotiated collective bargaining agreement (Goal moved from Fiscal Year 2007)

The following goal has been removed from Fiscal Year 2008:

- Implement the comprehensive, multi-tiered staff education and professional development plan (Goal moved to Fiscal Year 2009)

Fiscal Year 2009 Goals:

- Continue to assess, appropriately revise and implement components of the workforce plan relative to this plan year
- Implement the comprehensive, multi-tiered staff education and professional development plan, to include the possibility of establishing a centralized training resource functionality (Goal moved from Fiscal Year 2008)
- Establish formal NHRS succession plan
- Develop NHRS staff incentive and reward program, and begin implementation of any approved components relative to this plan year
- Offer Employee Self-Service capability for NHRS payroll and HR functions

Investments

Jeff Gendron, Investment Analyst

The Investments functional area led the efforts of several initiatives related to best practices during Fiscal Year 2006.

Fiscal Year 2006 Accomplishments:

- Conducted analysis and due diligence research on general investment consulting firms leading to the selection of Ennis Knupp + Associates in December 2005
- Established consulting relationship with Ennis Knupp
- Coordinated the efforts of Ennis Knupp to conduct an asset liability modeling (ALM) study resulting in revised asset allocation policy targets
- Facilitated a risk-budgeting analysis of the investment program, in conjunction with Ennis Knupp, resulting in the adoption of a significant passive-management component in the domestic equity asset class
- Streamlined the investment performance reporting process by improving workflow and timelines as well as implementing best practices
- Finalized the investment information in the Fiscal Year 2005 CAFR with input from KPMG and in collaboration with the Financial Reporting Team
- Conducted due diligence meetings with five public market investment managers, in conjunction with Ennis Knupp
- Coordinated the revision of NHRS proxy voting guidelines for 2006 proxy season
- Implemented Northern Trust Compliance Alert System (live date 9/30) to systematically monitor portfolio compliance to NHRS investment guidelines
- Initiated the monitoring process and procedures to ensure portfolio compliance with the NHRS investment guidelines using Northern Trust's Compliance Alert System

Fiscal Year 2007 Goals:

- Analyze and recommend comprehensive strategy and structure for the commercial real estate program based on the revised policy allocation target of 5% in this asset class (modified and moved from Fiscal Year 2006 goals due to ALM)
- Continue RFP process for all investment-related service providers on a rotating basis, as appropriate, and adhere to consultant's manager search process and standards (modified and continued from Fiscal Year 2006 goals)
- Develop a process for the annual review of proxy voting guidelines, service provider contracts for competitiveness, and for review of investment and internal control risk exposure in accordance with the COSO/GARP Standards (modified and continued from Fiscal Year 2006 goals)

Fiscal Year 2008 Goals:

- Continue RFP process for all investment-related service providers on a rotating basis, as appropriate, and adhere to consultant's manager search process and standards (continued from Fiscal Year 2007 goals)
- Continue the annual review of proxy voting guidelines, service provider contracts for competitiveness, and for review of investment and internal control risk exposure in accordance with the COSO/GARP Standards (continued from Fiscal Year 2007 goals)

Fiscal Year 2009 Goals:

- Complete the implementation of Fiscal Year 2007 - 2008 strategic goals
- Evaluate and enhance investment technology to ensure adherence with best practices for monitoring, management & compliance
- Administer and adjust the workforce plan, as needed, to incorporate needs assessment, effective deployment of current resources, cross-training and succession planning
- Review and revise, as necessary, policies, guidelines and procedures
- Determine best practices for handling security litigation activities including the establishment of a security litigation policy, requisite technology solutions, and administrative processes (modified and moved from Fiscal Year 2008 goals)
- Continue the annual review of proxy voting guidelines, service provider contracts for competitiveness, and for review of investment and internal control risk exposure in accordance with the COSO/GARP Standards

Information Technology (IT)

Cecile Merrill, Director

The Information Technology (IT) functional area played a major role in the office relocation while conducting daily IT-related tasks and assignments during Fiscal Year 2006. .

Fiscal Year 2006 Accomplishments:

- Planned and implemented a secure method to submit Employer Wage and Contributions files
- Installed new phone system
- With effective planning, maintaining IT services in two office buildings simultaneously, and a “phase-in” approach to transition, NHRS operations were minimally impacted during the office relocation
- Replaced all computers
- Replaced two servers
- Installed helpdesk software
- Prepared final draft of Password Policy
- Collaborated with developing new web site
- Collaborated with developing contact center
- Installed 15 new Pension Gold builds
- Collaborated in developing new annual member statements
- Responded to 225 SIRS/PIRS

Fiscal Year 2007 Goals:

- Continue to replace non-PG servers
- Continue to implement an improved web site which will consolidate the two current web sites
- Develop a plan for hardware/software life cycle
- Continue to review and revise, as necessary, policies, guidelines and procedures
- Continue to review and revise, as necessary, the security surrounding the network
- Continue to review and revise, as necessary, the Disaster Recovery Plan
- Continue to coordinate and manage PG functionality with other business units
- Continue to assist other business units with meeting their objectives based on their IT needs
- Implement faxing software
- Enhance the helpdesk software functionality
- Roll out the phone system software
- Roll out Web Member Services
- Develop plan for imaging
- Plan and implement a contact center

The following goal has been removed from Fiscal Year 2007:

- Implement an intranet

Fiscal Year 2008 Goals:

- Continue to review and revise, as necessary, policies, guidelines and procedures
- Continue to review and revise, as necessary, the security surrounding the network
- Continue to review and revise, as necessary, the Disaster Recovery Plan
- Continue to coordinate and manage PG functionality with other business units

- Implement plan for imaging
- Continue to assist other business units with meeting their objectives based on their IT needs

Fiscal Year 2009 Goals:

- Continue to review and revise, as necessary, policies, guidelines and procedures
- Continue to review and revise, as necessary, the security surrounding the network
- Continue to review and revise, as necessary, the Disaster Recovery Plan
- Continue to coordinate and manage PG functionality with other business units
- Continue to assist other business units with meeting their objectives based on their IT needs

Legal & Compliance

Timothy Crutchfield, Chief Legal Counsel

An internal compliance functional team was created in Fiscal Year 2006 to further strengthen internal controls and establish appropriate monitoring processes as part of NHRS' best practices. The Legal & Compliance Team includes a chief legal counsel, a hearings officer, an internal auditor and a regulatory compliance officer and.

Fiscal Year 2006 Accomplishments:

- Oversaw the hiring and training of three positions: Internal Auditor, Hearings Examiner and Regulatory Compliance Officer
- Secured the renewal of NHRS Fiduciary liability insurance for the same coverage and premium
- Oversaw the successful passage by the NH Legislature of three NHRS-sponsored bills and provided legislative oversight involving multiple bills affecting NHRS, including testimony before House and Senate subcommittees
- Provided legal advice and implementation assistance to NHRS Board and staff on multiple subjects including NHRS membership eligibility for seasonal employees; interest paid on members' accumulated contributions; refunds to two-year inactive members; multiple Right-to-Know requests; military service credit.
- Assisted in the review, update and development of the 12/02 IFS Audit recommendations
- Developed and issued the NHRS Political Contributions Policy requiring affirmative response from providers
- Presented 82 disability retirement applications and 13 administrative appeals to the Board for its consideration and conducted 14 adjudicatory hearings
- Assisted with compilation of materials requested by special external audit
- Initiated the review of the NHRS travel and ethics policies
- Initiated the systematic review of all NHRS publications and forms
- Provided legal review to the NHRS Investment functional area regarding contract assignments

Fiscal Year 2007 Goals:

- Continue to review and appropriately revise, as necessary, all policies, procedures and publications
- Participate in the Collective Bargaining Agreement (CBA) process
- Assist in the development and review of periodic RFP's for all vendors
- Assist staff in the implementation of new legislation impacting NHRS
- Assist with annual external audit
- Conduct risk management and initial phase of internal audit

Fiscal Year 2008 Goals:

- Continue to review and revise, as necessary, all policies, procedures and publications
- Continue the development and review of periodic RFP's for all vendors
- Assist in the implementation of the 7/1/07 CBA
- Assist with annual external audit
- Conduct next phase of internal audit
- Assist staff in the implementation of new legislation impacting NHRS

Fiscal Year 2009 Goals:

- Continue to review and revise, as necessary, all policies, procedures and publications
- Continue the development and review of periodic RFP's for all vendors
- Assist with annual external audit
- Conduct next phase of internal audit
- Continue to provide legal research, review and opinion to management and staff as requested
- Continue to represent and/or coordinate legal representation on behalf of NHRS in adjudicative proceedings
- Continue to oversee the drafting, editing and implementation of statutes and administrative regulations
- Assist staff in the implementation of new legislation impacting NHRS

Member Services

Merelise O'Connor, Chief Member Services Officer

The Member Services strategic plan activities for Fiscal Year 2006 included many significant advances in providing quality member and retiree services.

Fiscal Year 2006 Accomplishments:

Member Services conducted a three-month Expanded Hours Pilot Program, whereby the NHRS business hours were expanded each Wednesday afternoon from 4PM to 6 PM and on one Saturday morning each month. The program is being evaluated based on member and staff feedback.

Member Services began participation in the Cost Effective Measurement (CEM) Benchmarking analysis and assessing maximum resource utilization. The NHRS total adjusted administration cost was \$82 per active member for Fiscal Year 2005. In considering the factors that impact cost relative to the peer group, CEM estimates that the Benchmark cost is \$114. This means that NHRS is operating at a lower cost than would have been expected given volumes and types of transactions. NHRS scored well as compared to the peers with respect to the length of time it takes for a telephone caller to speak to a knowledgeable person (45 seconds) and if the telephone call results in the member's need being satisfied (84%). Member Statements were also scored highly for content. The CEM report made suggestions that are in concurrence with the strategic plan initiatives. Two significant considerations are the development of a contact center and web access with an on-line benefit calculator.

Member Services responded to 85,819 emails and phone calls during Fiscal Year 2006.

Member Benefits

The Member Benefits Team has taken a number of steps in preparation for serving the increased numbers of retirement-eligible members:

- Worked with 75 school districts to anticipate numbers of teacher retirements
- Delivered group counseling meetings ("Spring Fling" Filing Sessions) for 63 members who were ready to file applications
- Provided estimate workshops for 40 teachers in Nashua and 28 teachers in Manchester

Service was provided to more than 10,000 members:

- Counseled over 1,500 members in one-on-one sessions
- Reduced the response time for benefit finalization from 3 months to 2 months
- Provided more than 3,000 benefit calculations
- Processed 5,000 refunds, primarily due to the change in RSA 100-A:11, requiring refunds of contributions to members who are inactive for two years
- Processed 844 service purchases
- Provided 511 calculations for additional contributions.
- Processed 20 active member death benefits
- Prepared 89 disability retirement cases for review by Legal & Compliance

Member accountants identified and notified retirement-eligible and vested deferred members of their benefits rights:

- 748 records reviewed resulted in a change in status from inactive to vested
- 439 members were notified of retirement eligibility

Annuity

The Annuity Team made significant progress with its Annuity Direct Deposit project, resulting in an increase from 75% to 80% of the 20,200 annuitants who are now receiving pension payments electronically. Approximately 99% of new retirees select direct deposit for the payment method.

Annuity processed 20,347 pension payments, 1,618 of which were added to the annuity payroll in Fiscal Year 2006, for a total annuity payroll of \$317,682,732.

Member Benefits – Fiscal Year 2007 Goals:

- Review, streamline and document 3-5 work processes procedures, policies and guidelines
- Participate in the develop of workforce plan to include needs assessment, effective deployment of current resources, cross-training and succession planning
- Implement 1-3 recommendations derived from the effective measurement tool to achieve median comparison with respect to peer groups and adopt accepted quality standards and response times for member contact
- Prepare for counseling/benefit processing to meet needs of increased retirement-eligible population, projected to double within two years (June '08 retirement activity)
- Participate in planning and training for phase one contact center; formulate frequently asked questions list; and participate in planning for imaging project as appropriate
- Test member web access
- Identify and develop process for large-scale data cleansing
- Modify a report to identify eligibility/vested deferred members
- Resolve outstanding PIRS/SIRS, complete reports and correspondence functionality
- Implement additional contributions calculations functionality in PG
- Integrate information currently stored in stand-alone databases
- Evaluate expanded hours of operation
- Develop and conduct a general satisfaction survey for members
- Develop a plan to increase awareness of members eligible to pre-select a survivorship option
- Consider elimination of notarization for documents
- Consider content of estimates (per CEM)

Member Benefits – Fiscal Year 2008 Goals:

- Implement 1-3 recommendations derived from the effective measurement tool to achieve median comparison with respect to peer groups and adopt accepted quality standards and response times for member contact
- Participate in assessment and refinement of contact center operations; in imaging project, as appropriate
- Continue data cleansing
- Explore providing member counseling in field locations
- Assess archival records retention
- Process 2008 retirements

- Consider conducting satisfaction surveys focused on counseling, calls, presentations, publications, refunds, purchases, estimates
- Collaborate with PIO to attend retirement preparation meetings held by employers, associations
- Review, streamline and document 3-5 work processes procedures, policies and guidelines

Member Benefits – Fiscal Year 2009 Goals:

- Implement 1-3 recommendations derived from the effective measurement tool to achieve median comparison with respect to peer groups and adopt accepted quality standards and response times for member contact
- Participate in assessment and refinement of contact center operations
- Continue data cleansing
- Conduct satisfaction surveys
- Review, streamline and document 3-5 work processes procedures, policies and guidelines

Annuity – Fiscal Year 2007 Goals:

- Review, streamline and document 3-5 work processes procedures, policies and guidelines
- Participate in the development of workforce plan to include needs assessment, effective deployment of current resources, cross-training and succession planning
- Develop and publish a post-retirement handbook
- Achieve 85% annuitant participation in direct deposit
- Pursue feedback prior to implementation of issuance of annuity advisory notices and checks directly to members from the vendor
- Complete development of gainful occupation/PG software functionality
- Participate in planning and training for phase one contact center, formulate frequently asked questions list; and participate in planning for imaging project as appropriate
- Participate in wide-ranging employer collaboration initiatives
- Complete implementation of letter functionality in PG
- Complete implementation of Local Government Center (LGC) modification for dependent information — LGC was formerly the NH Municipal Association (NHMA)
- Plan for 5% increase in annuitants and in retirees' medical insurance payments
- Resolve outstanding PIRS/SIRS, complete reports and correspondence functionality
- Annual recertification for medical subsidy
- W-4P annual re-notification and response team
- 1099 response team
- State NH health care administration transition
- Implement 1-3 recommendations derived from the effective measurement tool to achieve median comparison with respect to peer groups and adopt accepted quality standards and response times for member contact
- Explore assumption of gainful occupation responsibilities (training)
- Develop a general satisfaction survey for retiree population
- Evaluate expanded hours of operation
- Pursue feedback prior to implementation of issuance of annuity advisory notices and checks directly to members from the vendor

Annuity – Fiscal Year 2008 Goals:

- Implement 1-3 recommendations derived from the effective measurement tool to achieve median comparison with respect to peer groups and adopt accepted quality standards and response times for member contact
- Achieve 87% annuitant participation in direct deposit
- Plan for 8% increase in annuitants and retiree's medical insurance payments
- Develop satisfaction surveys for targeted retiree populations
- Assume gainful occupation responsibilities
- Participate in assessment and refinement of contact center operations; in imaging project, as appropriate
- Review, streamline and document 3-5 work processes procedures, policies and guidelines
- Consider elimination of notarization for documents
- W-4P annual re-notification and response team
- 1099 response team

Annuity – Fiscal Year 2009 Goals:

- 1099 response team
- W-4P annual re-notification and response team
- Participate in assessment and refinement of contact center operations
- Plan for 10% increase in annuitants and retiree's medical insurance payments
- Assess Archival record retention
- Achieve 90% annuitant participation in direct deposit
- Conduct and refine satisfaction surveys
- Consider banking services/other deductions
- Implement 1-3 recommendations derived from the effective measurement tool to achieve median comparison with respect to peer groups and adopt accepted quality standards and response times for member contact
- Review, streamline and document 3-5 work processes procedures, policies and guidelines

Public Information

Kim France, Public Information Officer

The Public Information functional area launched several initiatives during Fiscal Year 2006 to enhance communication with the membership, government officials, various constituencies and the general public, and to support measurable improvement in services for the NHRS membership.

Fiscal Year 2006 Accomplishments:

- Developed and delivered 82 member education outreach sessions, meeting with more than 4,000 active members throughout the state
- Established a collaborative relationship with the NH School Administrators Association to launch SAU initiative, expanding outreach to more teacher and employee members of school districts throughout the state, delivering education outreach sessions to 19 SAUs
- Initiated new outreach program for retired members and delivered six sessions, meeting with approximately 200 retired members throughout the state
- Developed and delivered 13 constituent group presentations and/or served as a guest speaker on a statewide basis, meeting with more than 500 individuals
- Developed and implemented an email subscribe service in collaboration with the IT team, issuing 11 email news releases to over nearly 400 subscribers
- Revised annual member statement format based on feedback gathered during six member focus group sessions
- Established collaborative relationship with Division of Personnel's Bureau of Education & Training, Social Security and ING to offer six state employee retirement planning sessions
- Prepared 10 news releases for publication in external constituent newsletters
- Responded to more than 3500 email inquiries
- Responded to more than 1800 telephone inquiries
- Processed 18 Right-to-Know requests
- Responded to more than 40 media inquiries
- Created and published an annual retiree newsletter and four employer newsletters
- Began web site redesign process, initiating comprehensive web site content review
- Facilitated research gathering of internal workflow processes specific to contact center needs
- Developed and delivered three strategic planning update meetings for all NHRS staff
- Participated in legislative process, attending hearings as needed

Fiscal Year 2007 Goals:

- Develop and implement regional-based pilot program for delivering member education outreach sessions to large groups on an annual basis
- Deliver statewide, smaller group member education outreach sessions
- Evaluate retiree outreach
- Assist with implementing redesigned web site including member web access
- Develop client satisfaction surveys
- Create updated employer manual
- Develop employer training program
- Assist with developing and implementing contact center plan
- Assist with editing, as needed, format and content of annual member statements

- Develop and implement an internal and external communications plan to include a media relations policy and to be based on the information needs of an increased retirement-eligible population (Goal moved from Fiscal Year 2006)

Fiscal Year 2008 Goals:

- Deliver large group, annual member education outreach sessions on a regional basis
- Deliver statewide, smaller group member education outreach sessions
- Evaluate retiree outreach
- Participate in the implementation of employer training programs

Fiscal Year 2009 Goals

- Deliver large group, annual member education outreach sessions on a regional basis
- Deliver statewide, smaller group member education outreach sessions
- Evaluate retiree outreach
- Participate in the delivery of employer training programs
- Maintain NHRS resource library